

**5102 Commissioner Of Higher Education
Executive Budget Reconciliation**

	General Fund FY 2010	General Fund FY 2011	General Fund FY 2010-11	Total Funds FY 2010	Total Funds FY 2011	All Programs Total Funds FY 2010-11
<i>Calculation of Executive Budget (Nov. 15, 2008)</i>						
FY 2008 Base	170,167,847	170,167,847	340,335,694	229,346,474	229,346,474	458,692,948
Statewide Present Law Adjustments	(22,643)	(57,051)	(79,694)	745,330	695,799	1,441,129
Other Present Law Adjustments	18,720,778	20,597,718	39,318,496	36,043,286	42,081,508	78,124,794
New Proposals	916,339	916,372	1,832,711	866,339	866,372	1,732,711
Original Executive Budget	189,782,321	191,624,886	381,407,207	267,001,429	272,990,153	539,991,582
Revised Executive Budget	182,035,240	184,764,463	366,799,703	256,353,983	260,176,948	516,530,931
<i>Executive Budget Revisions (Dec. 15, 2008)</i>						
PL00930 General Fund Replacement with Six Mill Levy Funds	(1,900,000)	300,000	(1,600,000)	-	-	-
PL01201 Loan Servicing Costs Increase	-	-	-	(4,716,171)	(5,568,273)	(10,284,444)
PL07101 Fuel Inflation Reduction	(16,326)	(37,768)	(54,094)	(16,579)	(38,058)	(54,637)
Present Law Total	(1,916,326)	262,232	(1,654,094)	(4,732,750)	(5,606,331)	(10,339,081)
NP00102 Information Resources, Planning, and Communication	(79,939)	(79,972)	(159,911)	(79,939)	(79,972)	(159,911)
NP00405 Reduce State Funding - Community Colleges	(68,609)	(134,005)	(202,614)	(68,609)	(134,005)	(202,614)
NP00802 Fund Deputy Commissioner for 2-Year Education	(50,000)	(50,000)	(100,000)	-	-	-
NP00920 PBS Restore One-Time Funding to be Ongoing	(200,000)	(200,000)	(400,000)	(200,000)	(200,000)	(400,000)
NP00950 Reduce State Funding - Educational Units	(2,278,514)	(3,056,093)	(5,334,607)	(2,278,514)	(3,056,093)	(5,334,607)
NP00960 Eliminate increase for Administrative Assessments	(237,342)	(309,823)	(547,165)	(237,342)	(309,823)	(547,165)
NP00970 Remove Present Law Pay Increases	(441,755)	(816,039)	(1,257,794)	(441,755)	(816,039)	(1,257,794)
NP01101 Restore One-Time Funding to be Ongoing	(461,400)	(461,400)	(922,800)	(461,400)	(461,400)	(922,800)
NP08101 Increasing 4% Vacancy Savings to 7%	(2,013,196)	(2,015,323)	(4,028,519)	(2,147,137)	(2,149,542)	(4,296,679)
New Proposal Total	(5,830,755)	(7,122,655)	(12,953,410)	(5,914,696)	(7,206,874)	(13,121,570)
Total All Decision Packages	(7,747,081)	(6,860,423)	(14,607,504)	(10,647,446)	(12,813,205)	(23,460,651)

MONTANA UNIVERSITY SYSTEM

The above table summarizes the calculation of the original executive budget (Nov. 15, 2008) and the changes made by the executive to derive the revised executive budget (Dec. 15, 2008) for the Office of the Commissioner of Higher Education (OCHE) and the Montana University System (MUS).

Calculation of Original Executive Budget

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Changes between Nov. 15, 2008 and Dec. 15, 2008

Between the November 15, 2008 and the December 15, 2008 budgets the Governor reduced the proposed biennial budget for the OCHE/MUS by \$14.6 million general fund, \$23.5 million total funds. Most of the general fund reductions, \$13.2 million, impact the MUS educational units and research agencies and included the following:

- o Overall reduction in state funds to the educational units --\$5.3 million general fund reduction over the biennium
- o Increase 4% vacancy savings to 7% at the MUS educational units and research agencies -- \$4.0 million general fund reduction over the biennium
- o Funding switch – Replace \$1.6 million general fund with a like amount of six-mill levy revenue at the educational units

5102 Commissioner Of Higher Education Executive Budget Reconciliation						All Programs
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- Remove present law pay increases for the educational units and agencies -- \$1.2 million general fund reduction over the biennium
- Remove funding for increased administrative assessment costs at the research agencies -- \$0.5 million general fund reduction over the biennium
- Montana public television -- remove \$0.4 million general fund over the biennium

Changes in other programs between Nov. 15 and Dec. 15 include:

- Removal of inflationary increases for gasoline and diesel fuel
- Reduce funding for Information Resources, Planning, and Communication position in OCHE -- \$159,900 general fund reduction over the biennium
- Reduce community college funding -- \$0.2 million general fund over the biennium
- Reduce funding for the Deputy Commissioner for 2-Year Education position in OCHE -- \$100,000 general fund reduction over the biennium
- \$922,800 biennial general fund reduction for Tribal College Assistance for non-beneficiary students
- \$10.3 million biennial federal fund reduction to correct an error in the original executive budget

						All Programs
	General Fund FY 2010	General Fund FY 2011	General Fund FY 2010-11	Total Funds FY 2010	Total Funds FY 2011	Total Funds FY 2010-11
<i>Calculation of Executive Budget (Nov. 15, 2008)</i>						
FY 2008 Base	642,761,421	642,761,421	1,285,522,842	783,028,298	783,028,298	1,566,056,596
Statewide Present Law Adjustments	552,796	597,807	1,150,603	1,041,649	1,110,468	2,152,117
Other Present Law Adjustments	32,484,631	47,331,905	79,816,536	42,618,698	60,558,728	103,177,426
New Proposals	7,585,550	11,377,890	18,963,440	7,585,550	11,377,890	18,963,440
Original Executive Budget	683,384,398	702,069,023	1,385,453,421	834,274,195	856,075,384	1,690,349,579
Revised Executive Budget	676,995,196	694,351,893	1,371,347,089	827,714,348	848,187,150	1,675,901,498
<i>Executive Budget Revisions (Dec. 15, 2008)</i>						
PL00011 School Facilities Reimbursement	(250,000)	(250,000)	(500,000)	(250,000)	(250,000)	(500,000)
PL00100 Guarantee Account Adjustment	-	501,000	501,000	-	501,000	501,000
PL00201 K-12 BASE Aid - Present Law ANB Adjust	401,429	821,983	1,223,412	401,429	821,983	1,223,412
PL07101 Fuel Inflation Reduction	(60)	(69)	(129)	(67)	(76)	(143)
Present Law Total	151,369	1,072,914	1,224,283	151,362	1,072,907	1,224,269
NP00003 School Foods Equip/Facility Mini Grants-Bien/OTO	(150,000)	-	(150,000)	(150,000)	-	(150,000)
NP00021 21st Century E-learning - MT Virtual High School	(450,000)	(1,000,000)	(1,450,000)	(450,000)	(1,000,000)	(1,450,000)
NP00026 Student Assessment	(325,000)	(325,000)	(650,000)	(325,000)	(325,000)	(650,000)
NP00028 Quality Educator Payment	(1,300,000)	(2,600,000)	(3,900,000)	(1,300,000)	(2,600,000)	(3,900,000)
NP00099 Quality Schools Resource Sharing	(100,000)	(100,000)	(200,000)	(100,000)	(100,000)	(200,000)
NP00101 Quality School Facility Program	(4,078,000)	(4,627,000)	(8,705,000)	(4,078,000)	(4,627,000)	(8,705,000)
NP08101 Increasing 4% Vacancy Savings to 7%	(137,571)	(138,044)	(275,615)	(308,209)	(309,141)	(617,350)
New Proposal Total	(6,540,571)	(8,790,044)	(15,330,615)	(6,711,209)	(8,961,141)	(15,672,350)
Total All Decision Packages	(6,389,202)	(7,717,130)	(14,106,332)	(6,559,847)	(7,888,234)	(14,448,081)

Between the November 15, 2008 and the December 15, 2008 budgets the Governor reduced the proposed budget for OPI by \$14.1 million of general fund, \$14.4 million in total funds. The reductions in general fund include elimination of the following proposals:

- 1) 21st Century E-learning – Mt virtual high school \$1.45 million over the biennium
- 2) Quality educator payment increases - \$3.9 million over the biennium
- 3) Quality School Facility Program – \$8.705 million over the biennium
- 4) Student assessment - \$0.65 million over the biennium
- 5) School foods equipment/facility mini grants - \$0.15 million over the biennium
- 6) School facilities reimbursement - \$0.5 million over the biennium
- 7) Quality schools resource sharing - \$0.2 million over the biennium

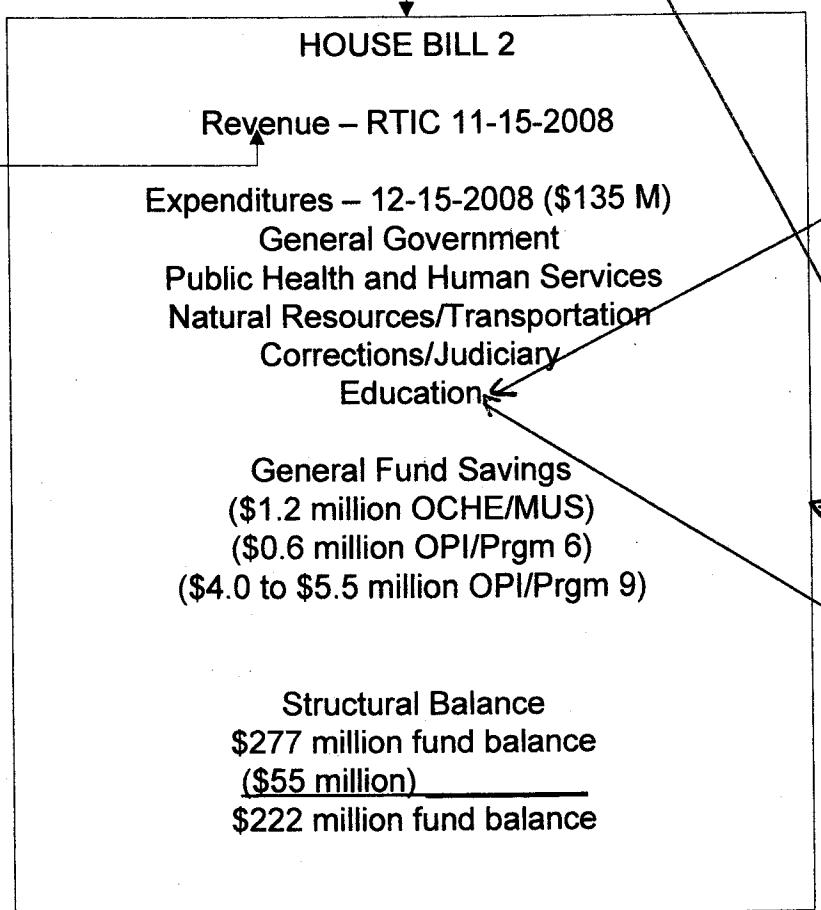
Other changes in general fund include:

- 1) Decreasing the guarantee account - \$0.501 million FY 2011
- 2) Increasing the K-12 base aid adjustment - \$1.223 million over the biennium

Finally the Governor proposed increasing vacancy savings from 4 percent to 7 percent, reducing general fund by \$0.275 million and total funds by \$0.617 million over the biennium.

Revenue Estimates
12-15-08 (\$135 million)
1-15-09 (\$ 85 million)

House Bill 152/ House Bill 5



<i>N.R./</i>	ARRA (Economic Stimulus)
	Transportation
	Labor and Industry
	Medicaid
	Health Programs
	EDUCATION
	Appropriation Enhancements
	\$92.918 million total
	28 % of MT school districts don't receive Title 1-A
	Title 1-A \$38.5million
	Title 1-A -\$6.242 million
	Title II-D - \$4.838 million
	IDEA - \$43.038 million
	Homeless Children - \$300,000
	School Modernization
	Title 1A- formula - \$44.064 million
	Higher Education
	Building Fund - \$19.2 million
	State Stabilization Fund
	\$196 million
	39 percent Governor plan
	61 percent Education \$119 million
	1. MOE – FY 2006
	2a. K-12 FY 2008 level
	% or \$\$
	b. Higher Education
	% or \$\$
	c. K-12 Title I schools
	Higher Education
	Pell grants
	\$60.9 million

House Bill 152/ House Bill 5

Revenue Estimates
12-15-08 (\$135 million)
-15-09 (\$ 85 million)

HOUSE BILL 2

Revenue – RTIC 11-15-2008

Expenditures – 12-15-2008 (\$135 M)

General Government

Public Health and Human Services

Natural Resources/Transportation

Corrections/Judiciary

Education

General Fund Savings

(\$1.2 million OCHE/MUS)

(\$0.6 million OPI/Prgm 6)

(\$4.0 to \$5.5 million OPI/Prgm 9)

Structural Balance
\$277 million fund balance
(\$55 million)
\$222 million fund balance

ARRA (Economic Stimulus)
S. 336
Transportation
Labor and Industry
Medicaid
Health Programs
EDUCATION

Appropriation Enhancements

\$88.138 million total

28 % of MT school districts don't receive Title 1-A
Title 1-A \$33.72 million School
Title 1-A -\$6.242 million improve-
Title II-D - \$4.838 million ment
IDEA - \$43.038 million grants.
Homeless Children - \$300,000

School Modernization
Title 1A- formula - \$0
Higher Education
Building Fund - \$0

State Stabilization Fund
100 percent Education \$97 million
1. MOE – FY 2006
2a. K-12 FY 2008 level
% or \$\$
b. Higher Education
% or \$\$
c. K-12 Title I schools

Higher Education
Pell grants
\$60.9 million

Agency/Function	Description	Conditions on the Money?	How Distributed?	How Much?	Need to be Appropriated?	Issues/Comments/Legislative Decision Points
OP/Title I-A Grants to States (ESEA)	Education of disadvantaged children for services to low achieving K-12 students	Used for purposes authorized in Title I-A of the ESEA. S. 336 require 15 percent used for children not at grade level and to support preschool programs. Reports on per pupil expenditures for FY 2009 filed with state, state requirements on maintenance of effort	To school districts by formula grant based upon the FY 2008 current allocation of Title 1-A grants $\frac{1}{2}$ on targeted grant formula component and $\frac{1}{2}$ on EFIC formula	H.R. 1/S. 336 Total federal: \$11 billion H.R. 1 \$5.5 billion for FFY 2009, \$5.5 billion for FFY 2010 S. 336 \$11.0 billion for FFY 2009 Estimated state: H.R. 1 \$19,057 in FFY 2009 \$19,057 million in FFY 2010 S. 336, \$38,115 million in FFY 2009	Yes	Funds based on populations of low-income families in school district, 28 percent of Montana school districts would not receive funds, S. 336 currently restricts funds based on taxable base of district, would eliminated Bozeman elementary from receiving funds
OPV/Title I-A School Improvement Grants (ESEA)		Supplementary funds for school improvement for schools failing to make annual yearly progress	95% to local school districts for grants of \$50,000 to \$500,000 to meet goals of school improvement plans, maintenance of effort requirements	States apply for grants	H.R. 1/S. 336 Total federal: \$2 billion H.R. 1 \$1.0 billion for FFY 2009, \$.0 billion for FFY 2010 S. 336 \$2.0 billion for FFY 2009 Estimated state: H.R. 1 FFY 2009	Funds based on populations of low-income families in school district, 28 percent of Montana school districts would not receive funds, S. 336 currently restricts funds based on taxable base of district, would eliminated Bozeman elementary from receiving funds

Agency/Function	Description	Conditions on the Money?	How Distributed?	How Much?	Need to be Appropriated?	Issues/Comments/Legislative Decision Points
OPI/Education Technology (ESEA Title II-D)	Increase access to educational technology, support the integration of technology into instruction, enhance technological literacy and support technology-related professional development of teachers	95 percent to local school districts, 50 percent by formula, 50 percent competitively, maintenance of effort requirements	To school districts in proportion to Title IA grants	H.R. 1/S. 336 2010 \$3.121 million, S. 336 \$6.242 million in FFY 2009	Yes Total federal: \$1 billion H.R. 1 \$5 billion for FFY 2009, \$5 billion for FFY 2010 S. 336 \$1.0 billion for FFY 2009 Estimated state: H.R. 1 \$2.419 million in FFY 2009, \$2.419 million FFY 2010, S. 336 \$4.838 million in FFY 2009	Funds based on populations of low-income families in school district, 28 percent of Montana school districts would not receive funds, S. 336 currently restricts funds based on taxable base of district, would eliminated Bozeman elementary from receiving funds
OPI/Credit Enhancement Initiatives to Assist Charter Schools (ESEA Title V-B-2)	For acquisition, construction, or renovation of public charter schools			Competitively awarded at federal level	H.R. 1 Total federal \$25.0 million for FFY 2009 S. 336 not included Estimated state \$0	Yes

Agency/Function	Description	Conditions on the Money?	How Distributed?	How Much?	Need to be Appropriated?	Issues/Comments/Legislative Decision Points
OPI/Fund for the Improvement of Education (ESEA Title V-D)	Innovative K-12 educational activities.		Competitively awarded at federal level	H.R. 1 \$200.0 million in FFY 2009 S. 336 not included Estimated state \$0	Yes	
OPI/Impact Aid Section 8007: Construction (ESEA Title VII)	To compensate school districts for substantial and continuing financial burden resulting from federal activities	Construction and upgrading facilities with high percentages of children living on Indian lands	To school districts by formula and competitively awarded grants	H.R. 1 \$100.0 million in FFY 2009 S. 336 not included separately for allocated as part of the construction program Estimated state: ?	Yes	
OPI/IDEA, Part B and Part C	Special education and related services for children with disabilities for school age children and preschool children with disabilities	Uses allowable under IDEA, Part B, maintenance of effort	To school districts by formula based on the number of children requiring special education	H.R. 1/S. 336 13.0 billion H.R. 1 \$6.0 billion in FFY 2009, \$7.0 billion in FFY 2010 S. 336 \$13.0 billion in FFY 2009 Estimated state: H.R. \$35.639 million in FFY 2009, \$43.208 million in FFY 2010, S.	Yes	Increases federal portion of special education costs in school districts to 26.3 % of the national average per-pupil expenditure in H.R. 1 in FFY 2009 and 26.8 percent in FFY 2010. S. 336 is estimated to be 37.6 percent in FFY 2009. Montana provides additional funding within the direct state aid component of the formula.

Agency/Function	Description	Conditions on the Money?	How Distributed?	How Much?	Need to be Appropriated?	Issues/Comments/Legislative Decision Points
OPI/IDEA, Part C	Special education and related services to serve infants and toddlers with disabilities	Uses allowable under IDEA, Part C	To school districts by formula based on the number of children requiring special education	336 \$77,217 in FFY 2009	Yes	
OPI/McKinney-Vento Homeless Assistance	To provide education access for homeless children and youth		To states based on formula of number of homeless student in FY 2008 competitive grants for school districts	H.R. 1 \$33 million in FFY 2009, \$33 million in FFY 2010 S. 336 \$70 million in FFY 2010 Estimated state: H.R. 1 \$300,000 FFY 2009, \$300,000 in FFY 2010, S. 336 \$219,000 FFY 2009	Yes	Funds based on populations of low-income families in school district, 28 percent of Montana school districts would not receive funds, S. 336 currently restricts funds based on taxable base of district, would eliminated Bozeman elementary from receiving funds
OPI/School Modernization, Renovation, and Repair	To modernize, renovate and repair elementary and secondary schools		Allocated to states based on Title I-A funding, minimum of \$5,000 per	H.R. \$14 billion in FFY 2009 S. 336 \$1.6 billion in FFY 2010 Estimated	Yes	Funds based on populations of low-income families in school district, 28 percent of Montana school districts would not receive funds, S. 336 currently restricts funds based on taxable base of district, would eliminated Bozeman elementary from receiving funds

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			LEA	state: H.R. 1 \$44,064 million FFY 2009, S. 336 \$77,575 in FFY 2009		
MUS/Pell Grants (discretionary appropriations)	Grants made available to low-income undergraduate students to help offset their costs associated with obtaining a postsecondary education	Pell Grants are the foundation of a student's financial aid package because all other forms of federal student aid are awarded after the Pell Grant award amount has been determined	To students, need-based	H.R. 1 Total federal \$15.636 Billion	No	Maximum grant would increase \$619 million Est. Amount to Montana students \$60.9 million S. 336 Total federal \$13.869 billion Maximum grant would increase \$400 million Est. Amount to Montana students \$49.5 million

Agency/Function	Description	Conditions on the Money?	How Distributed?	How Much?	Need to be Appropriated?	Issues/Comments/Legislative Decision Points
MUS/Pell Grants (mandatory appropriations)	Mandatory add-on to the discretionary grant		To students, need-based	H.R. 1 (only) Total federal \$1.514 billion	No	
MUS/Work-Study Program	Need-based federal student aid program that provides undergraduate, graduate, and professional students the opportunity for paid employment		To institutions of higher education, based upon existing distribution formulas	H.R. 1 (only) Total federal \$490.0 million Est. Amount to Montana not available	No	
Perkins Loan Program	Operates as an institutional revolving fund under which institutions of higher education make available low interest federal student loans		Funding is to be provided for federal capital contributions to the revolving loan funds of participating institutions of higher education	S. 336 (only) Total federal \$61.0 million Est. Amount to Montana not available	No	
Student Aid Administration	Increased funding to the U.S. Dept of Education to administer federal student aid programs		Money is for U.S. Department of Education	H.R. 1 (only) Total federal \$50.0 million	No	
Teacher Quality Partnership Grant Programs	Competitive grants for improving teacher education programs, strengthening		Competitive grant; state must apply	H.R. 1 (only) Total federal \$100.0 million	Yes	OCHE currently receives grants from this federal program. These federal funds are appropriated in HB 2 and are budgeted in Program 03-Improving Teacher Quality.

Agency/Function	Description	Conditions on the Money?	How Distributed?	How Much?	Need to be Appropriated?	Issues/Comments/Legislative Decision Points
	teacher recruitment efforts, and providing training for prospective teachers					
Higher Education Modernization, Renovation, and Repair	Money may be used for modernization, renovation, and repair of facilities that are primarily used for instruction, research, or student housing	Priority must be given to minority serving institutions, institutions that have been impacted by a major disaster, institutions that will carry out projects to increase their energy efficiency.	Allocated to state higher education agencies based upon the number of full-time equivalent undergraduate students enrolled in public and private not-for-profit postsecondary education schools	H.R. 1 Total federal \$6.0 billion Est. Amount to Montana \$19.2 million S. 336 Total federal \$3.5 billion	Yes	
Institute for Education Sciences	Design, development, and implement statewide longitudinal data systems to enable states to use, manage, and analyze individual student data in ways consistent with the		Competitive grants to state higher education agencies	H. R. 1 (only) Total federal \$250 million	Yes	

Agency/Function	Description	Conditions on the Money?	How Distributed?	How Much?	Need to be Appropriated?	Issues/Comments/Legislative Decision Points
ESEA. The data systems could include data systems that contain postsecondary and workforce information.						
Governor's Office/OPI/State Fiscal Stabilization Fund	61% of state allocation (approximately \$120 million) must be used to support elementary, secondary, and postsecondary education. The FY 2008 state funding level must be restored first. Any remaining funds from the 61% allocation must be distributed to local education agencies.	Maintenance of Effort Required State must establish a longitudinal data system Funds cannot be used for capital construction purposes. Funds may not be used to enhance higher education endowment funds.	Allocated to states 61% based on state's relative population of individuals ages 5 to 24 S. 336	\$39.5 billion in FFY 2009, \$39.5 billion in FFY 2010 \$79 billion in FFY 2009 Estimated state \$196 million	H. R. 1 Yes	<p>The allocation of the 39% portion may be determined by the legislature The allocation of the 61% portion goes allocated:</p> <ol style="list-style-type: none"> 1. To support K-12 education at the FY 2008 level 2. To support Higher Education at the FY 2008 level 3. To local school districts using the Title 1-A funding formula, In Montana 28% of the school districts would not qualify for the funds, in the Senate version Bozeman Elementary School District would also not qualify to receive these funds. <p>Institutions of higher education must use any funds for educational and general expenditures, and in such a way as to mitigate in-state student tuition increases.</p> <p>Reports Required o How funds were used</p>

Agency/Function	Description	Conditions on the Money?	How Distributed?	How Much?	Need to be Appropriated?	Issues/Comments/Legislative Decision Points
		<ul style="list-style-type: none"> ○ How funds were distributed ○ # of jobs created or saved ○ Tax increases averted ○ State's progress in certain educational areas ○ Tuition and fee increases for resident students imposed by public institutions of higher education and a description of any actions taken by the State to limit those increases ○ Resident student enrollment at institutions of higher education, including those eligible for Pell Grants or other need-based assistance 				

This will be filled out by section, by agency.

Section B you don't have to put the agency in.

Copy the file to your H so you can work on it at your leisure, and we'll then combine them.

Leave a row between your entries.

In "How Much", put what you know, starting with the total federal grant, and then anything you can get to on the state allocation. If you know the allocation method and can wing it, give them the general idea and then qualify it.

In "How Distributed", you don't need to go into detail. For example, if it is using the current allocation method, you don't need to explain how the current allocation works.